



DFD Consultants Conference 2012

CONSULTANT ORIENTATION

Large Projects and new A/E's

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AMERICAN COUNCIL OF ENGINEERING COMPANIES
of Wisconsin

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LARGE PROJECT CONSULTANT ORIENTATION

MY GOAL FOR YOU: GET SELECTED FOR A MAJOR PROJECT!

1. Understand submittal requirements
2. Prepare for shortlisting by putting together a top notch team and portraying team and experience in best light
3. Prepare for the interview
4. Learn from your experience and get the next project!



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LARGE PROJECT CONSULTANT ORIENTATION

WHAT YOU NEED TO KNOW AHEAD OF TIME

1. Administrative Code 20

- Eligibility requirements
- Qualifications-Based Selection processes
 - Less than \$5M (Lisa's and Craig's presentation)
 - = Greater than \$5M (this presentation)
- Performance evaluation (*see reference section*)
- Selection Committee Members

Gil Funk, Chair

Summer Shannon-Bradley

2 Agency Reps

Terry Bay

RJ Binau **

Jim Schey*

Godwin Amegashie, advisory
PM**

Dan Stephans*

****Interview process ONLY**

***Monthly ONLY**



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LARGE PROJECT CONSULTANT ORIENTATION

Administrative Code 20 Eligibility Requirements

ADM 20.02(6)(a) *More than one* architect/engineer (A/E) as responsible member of the firm

ADM 20.02(6)(b) Been in business for a period of *not less than 3 years*

ADM 20.02(6)(c) *A permanent office within Wisconsin*, where responsible direction of all services will be based

ADM 20.02(6)(d) Design and substantial completion of a *similar* project at least *50% as large as the construction cost or size* (square footage or other)



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LARGE PROJECT CONSULTANT ORIENTATION

Wisconsin Statutes 16.85

SS. 16.85 Department of administration; powers, duties. The DOA shall exercise the powers and duties prescribed by ss. 16.85 to 16.91:

16.85(1) To take charge of and supervise all engineering or architectural services or construction work, as defined in s. 16.87, performed by, or for, the state, or any department, board, institution, commission, or officer of the state, including nonprofit-sharing corporations organized for the purpose of assisting the state in the construction and acquisition of new buildings or improvements and additions to existing buildings as contemplated under ss. 13.488, 36.09, and 36.11, except [work to be performed for the University of Wisconsin System with respect to a building, structure, or facility involving a cost of less than \$500,000 that is funded entirely with the proceeds of gifts or grants made to the system, and except] the engineering, architectural, and construction work of the department of transportation; and the engineering service performed by the department of safety and professional services, department of revenue, public service commission, department of health services, and other departments, boards, and commissions when the service is not related to the maintenance, and construction and planning, of the physical properties of the state.



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LARGE PROJECT CONSULTANT ORIENTATION

WHAT YOU NEED TO KNOW AHEAD OF TIME

2. Fees and DFD Contract Terms and Conditions

(see small project reference section)

3. Policies and Procedures, BIM, CAD, Sustainable Design and Master Spec Stds, Commissioning *(see*

DFD website)

4. Minority Business Enterprise (MBE) and Disabled Veteran-Owned Business (DVB) participation

(see DFD website link)



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LARGE PROJECT CONSULTANT ORIENTATION

CONSIDERING A MAJOR PROJECT?

1. GET CONNECTED!!!

<http://www.doa.state.wi.us/dfd>

[Print Version](#)

Reorganization News

Effective July 1, 2012, the Division of State Facilities (DSF) within the Department of Administration (DOA) was reorganized into two separate divisions based on core functions. The new divisions are named: the **Division of Facilities Development (DFD)** which includes all Building Program and construction related services; and the **Division of Facilities Management (DFM)** for building management, maintenance, and tenant occupancy services. The services provided by DSF will not change and the reorganization will not present significant changes other than the name of the divisions. Mailing addresses, phone numbers, and email addresses will remain the same and both divisions will be located in the existing DSF space.

Thank you for your patience as we work through this transition.

-Quick Find-

- [Project Bidding - Construction](#)
- [AE Registration-Setup Data Record](#)
- [AE Invitation for Services](#)
- [DOA Job Opportunities](#)
- [DSF Call Center 266-1485](#)

[DOA Home](#)

[DSF Home Page](#)

- [DSF Staff and Organizational Info](#)
- [Contact Us by Specialty](#)

[What's New in DSF](#)

[Architecture & Engineering](#)

- [AE & Consultants Registration Info](#)
- [AE News & Procedure Manual](#)
- [AE Invitation for Services Info](#)
- [Master Specifications/Design Guidelines](#)
- [Project Bidding - Construction](#)
- [Best Project Awards ANNOUNCEMENT](#)
- [Let's Claim](#)
- [MBE Opportunities-AE & Construction](#)
- [Small Project Program](#)
- [WALMS - Login Screen](#)
- [Webuild - Login Screen](#)

[Facilities Management](#)

- [Building Information](#)
- [FMC](#)

[Portfolio Management - Leasing](#)

- [State of Wisconsin Building Tenant Manual](#)

[Building Commission](#)

- [General Information](#)
- [Building Commission Meeting](#)
- [Capital Budget](#)

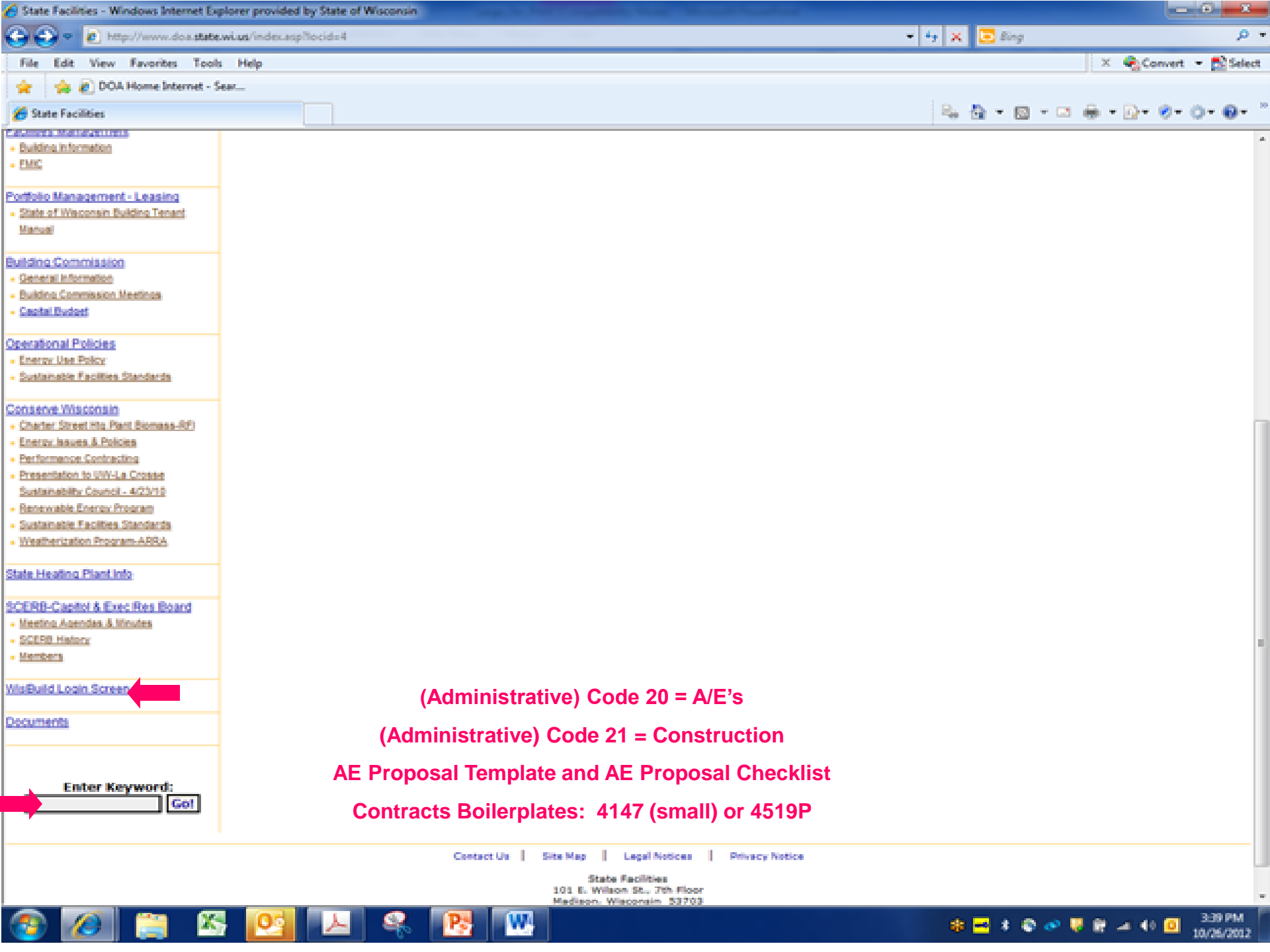
[Operational Policies](#)

- [Energy Use Policy](#)
- [Sustainable Facilities Standards](#)

[Conserve Wisconsin](#)

- [Charter Street Info Plant & Mass Info](#)
- [Energy Issues & Policies](#)
- [Performance Contracting](#)
- [Presentation to UW-La Crosse Sustainability Council - 4/23/12](#)
- [Renewable Energy Program](#)
- [Sustainable Facilities Standards](#)
- [Weatherization Program-ABRA](#)

[State Heating Plant Info](#)



(Administrative) Code 20 = A/E's

(Administrative) Code 21 = Construction

AE Proposal Template and AE Proposal Checklist

Contracts Boilerplates: 4147 (small) or 4519P

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[Portfolio Management - Leasing](#)

[Building Commission](#)

- [2009-11 Agency 6-Year Plan Summaries](#)
- [Project Delivery](#)
- [05-07 Agency 6 Yr. Plan Summaries](#)
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- [Renewable Energy Program](#)
- [Sustainable Facilities Standards](#)
- [Weatherization Program-ARRA](#)

AE and Consultant Invitation for Services

Firms interested in providing services for projects with the overall value above \$150,000 should regularly review the projects that are posted on the DSF web site, see links below. A WisBuild login is required to express interest in providing service for the listed projects. See the [AE & Consultants - How to Register to Provide Professional Services](#) web page for additional information.

- [AE Invitation for Services - \\$5 Million and Over & Selection Results](#) 
- *** [New AE Qualification Forms for Major Projects](#) ***
- [AE Solicitations - Under \\$5 Million](#) (Selection Committee Meeting Agenda)
- ***[Instructions for Uploading a Letter of Interest](#)***
- [AE Solicitation Results - Under \\$5 Million](#)
- [Anticipated Selection Committee Meeting Dates](#)

Last Modified: 1/14/2011 5:18:40 PM

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- [2009-11 Agency 6-Year Plan Summaries](#)
- [Project Delivery](#)
- [05-07 Agency 6 Yr. Plan Summaries](#)

Division of State Facilities Architect/Engineer Invitations for Service

Project No.: 10H3A
Project Name: **Madison, Athletic Performance Center**
Institution: UNIVERSITY OF WISCONSIN/MADISON CAMPUS
Location: CITY OF MADISON, Wisconsin
Construction Cost: \$56,800,000
AE Submittal Date: 11/9/2010 2:30:00 PM
Last Item Update: 10/12/2010 2:45:19 PM
Invitation file: [Qualification Solicitn.doc](#) (475 kB)
Support file 1: [Proj Description.pdf](#) (533 kB)
Support file 2: [Contract.doc](#) (307 kB)
Support file 3: [Screening Frm.xls](#) (69 kB)
Support file 4: [Standard Intvw Questions.doc](#) (53 kB)
Support file 5: [AE Fee Rate Sheet.xls](#) (48 kB)
Support file 6: [Sustainable Facilities Standards Checklist.xls](#) (79 kB)
Support file 7: [AEQualUpload InstructionsAE.pdf](#) (486 kB)
[Click here for a list of AEs interested in this project.](#)
[Upload Electronic Qualification Submittal.**](#)

**Note that the official AE qualification document shall be as submitted via two hard copies and one electronic (CD/DVD/Flash) copy to the DSF 7th Floor office at 101 E Wilson, Madison, WI 53702 by the deadline in the invitation file above.

Project No.: 10D2Q
Project Name: **Kenwood IRC - Phase 1**
Institution: UNIVERSITY OF WISCONSIN/MILWAUKEE CAMPUS
Location: CITY OF MILWAUKEE, Wisconsin
Construction Cost: \$59,950,000
AE Submittal Date: 10/13/2010 2:30:00 PM
Last Item Update: 10/21/2010 4:34:52 PM
AE Submitting Qualifications: Engberg Anderson Inc in association with SmithGroup Inc; Flad Architects; Hammel Green & Abrahamson Inc; Kahler Slater Inc in association with ZGF Architects LLP; Plunkett Raysich Architects; Strang Inc in association with BSA LifeStructures; Teng & Associates Inc; Zimmerman Architectural Studios Inc in association with HOK Chicago, HOK Atlanta

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LARGE PROJECT CONSULTANT ORIENTATION

CONSIDERING A MAJOR PROJECT?

2. Scrutinize Project Description/Program
3. Understand Qualifications
 - Required qualifications
 - “Well-Qualified” criteria
 - Experience and performance ranking of team

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LARGE PROJECT CONSULTANT ORIENTATION

CONSIDERING A MAJOR PROJECT?

4. Putting together a Team

Subconsultants

- Performance Evaluation with DFD

Associations

- Definition ADM 20.07 (4) (*see reference section*)
- Association \neq Subconsultant
- Weigh costs and benefits

Associate costs can be high, decrease your fees

Benefit to shortlisting/selection

How do experience/philosophies/talent line up and
compliment?

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LARGE PROJECT CONSULTANT ORIENTATION

CONSIDERING A MAJOR PROJECT?

4. Putting together a Team Associations

- Final negotiated, signed agreement between Prime and Associate **IS REQUIRED** at time of the final fee proposal
 - Jointly and severably liable
 - DFD Contract language overrides Agreement
 - Who designated to sign DFD contract (DFD prefers one firm)

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LARGE PROJECT CONSULTANT ORIENTATION

TWO PIECES TO MAJOR PROJECT SELECTION PROCESS

1. Shortlisting: Focus on Qualification Submittal
2. Interview: Focus on the Project

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LARGE PROJECT CONSULTANT ORIENTATION

Shortlisting: Focus on Qualification Submittal

Your Goal

Selection Committee's Priorities

Your Strategy

Method

Conditions/Stipulations

Implementation

Interview: Focus on the Project

Your Goal

Selection Committee's Priorities

Your Strategy

Method

Conditions/Stipulations

Implementation

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LARGE PROJECT CONSULTANT ORIENTATION

The Qualification Submittal



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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Your Goal: To be one of the top four teams shortlisted by providing **qualifications** that will satisfy and impress the Selection Committee.

Selection Committee's Priorities:

Team members, project assignment and relevant experience

Team worked together previously?

Relevant projects and depth of experience of firm and team members

Similar in scope, complexity, size and budget?

Details of Association arrangement

Level playing field

Same info/requirements, fair, confidentiality/ethics maintained

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Your Strategy:

Put together an outstanding team

Worked together before

Performance ranking

Association

How will responsibilities be split and shared?

Demonstrate experience with required project and relevant projects of your firm and team

Complete forms correctly, on time and qualify!



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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method:

AE Data Record

Administrative Code 20.02 (6) (d)

Submittal Forms

Uploading to DFD Website

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: AE Data Record

Establish: E-mail company name and address to

WisBuild@doa.state.wi.us

- Also assists WisBuild™ problems, forget password?

Maintain: log in to WisBuild@doa.state.wi.us,

click

VIEW / MODIFY INFORMATION

click

A/E DATA RECORD

at the bottom of the page

Before deadline, all team members and each office need an accurate, established AE Data Record for each office submitting!

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LARGE PROJECT CONSULTANT ORIENTATION

What is “WisBuild™ ”?

Web-based, electronic means of doing business, including showing interest in small projects, construction administration and payment requests.

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Administrative Code 20.02 (6) (d)

Design and substantial completion of a similar project at least 50% as large as the construction cost or size (square footage or other)

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Forms

Are mandatory requirements met? (ADM 20.02(6)(d))

How well qualified is the firm, team and individual team members?

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Forms

Maximum number of pages in submittal: 15

Refer to Invitation for Consultant Services sample and DFD web

Use only the forms on the web!!

Qualification and submittal consists of 2 parts

1. Upload completed submittal form to WisBuild, send 2 hard copies and 1 CD/DVD to DFD by due date/time (official copy)
2. Establish, complete and update A/E Data Records for entire team, including insurance by due date/time

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Form

Qualification Requirements

- Mandatory vs. Well Qualified
- Clarifications of Qualification Requirements
 - Permanent WI Office
 - Experience as Prime with other firms, other offices
 - Single building or portion of single building

Definitions:

- Substantial Completion
- Project
- Association vs. Subconsultant
- Similar
- Prime



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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Form

Other Requirements:

- 5% Minority Business Enterprise (MBE) participation goal
- Disabled Veteran-Owned Business (DVB) participation
- Association language requirements

How firms will be shortlisted and screened

Interview process

Selection Committee Members

Responsibility of A/E

Instructions for Completing Qualification Forms



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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Form

Section 1: Identifying the “Primes” including Associates

- Main submitting office(s)

- Single Contact for each Prime

- Indicate multiples offices separately (DFD performance scores by office)

Section 2: Team Organization Chart Showing Firms, Lead Staff and Disciplines

- Graphically show individuals, their services, disciplines, relationships

- Use graphic or chart that best represents this information

- Should show DFD at top of org chart

- All staff here should also be listed in Section 3, Team Matrix

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Qualification Submittal

LARGE PROJECT CONSULTANT ORIENTATION

Method: Submittal Form

Section 3: Team Matrix

Show firms, locations, teams, MBE or DVB participation

Shows individual team members, credential, roles,
disciplines, years with current and past firms

All staff also listed in Section 2, Team Organization Chart

Shows what individuals worked on what projects from 1
qualifying project (Section 4) and 4 other related
projects (Section 5)

May show an additional 4 projects of team members, not
detailed elsewhere

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Form

Section 4: Qualifying Project

Meeting the Requirement of **ONE** Similar Project 1/2 the Construction Value OR Square Footage/Size

- Firm as Prime or individual while with another firm as Prime OK
 - » Individual was Principal, Project A/E or Project Manager
- Firm or individual involved from programming or design through substantial completion
- Project is substantially complete by date of solicitation
- Project is new or renovation of **single** building or **portion of single** building

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Form

Section 4: Qualifying Project

Meeting the Requirement of **ONE** Similar Project 1/2 the Construction Value OR Square Footage/Size

- Meets definition of “similar” as defined in the solicitation
- Square footage/size OR construction value is minimum requirement for “similar” portion
 - » Indicate **unescalated** construction cost
- Well-qualified experience checkboxes
- Reflect back to Section 3, Team Matrix
- Additional information
- How this project relates to the advertised project

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Form

Section 4: Qualifying Project

Meeting the Requirement of **ONE** Similar Project 1/2 the Construction Value OR Square Footage/Size

- Project can be public or private project
- To qualify, no information can be confidential
- Must have 1 project that meets these requirements to qualify!!
- Ask questions until 5 business days before submittal due date
 - Can send sample Section 4 for review

Review your Associate Partner's qualifying project

Responsibility for accuracy with A/E: Qualification depends on it!

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Form

Section 5: Related Project(s) by Firms or Individuals

- A maximum of four related projects can be provided:
YOUR CHOICE!
- Reflect back to Section 3, Team Matrix
- Not required to meet qualifications
- Promotes Prime(s)'s and team's experience, where team worked together before and qualifications on other public or private projects

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Form

Section 5: Related Project(s) by Firms or Individuals

- Directly relates to Sections 3 and 5 of the Screening Form (subjective), completed by Selection Committee
- Checkboxes clarify scope, how well-qualified
- Information provided will **NOT** disqualify your firm
- Keep the examples relative to the major project in type, complexity, and minimum size and cost, if possible

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Form

Section 6: Additional Team Related Experience

Elaborate on how your team will approach the project, work together, how qualifications contribute to the project

Section 7: Association Responsibilities

Provide details of roles, responsibilities and management throughout phases of project, including graphic representation

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Submittal Form

Section 8: Registration Requirements

Name and registration of two Principals of the Prime(s) firm

Section 9: Statement of Fact

- Verification of meeting the ADM 20.02 (4) (d), responsible for completeness, errors/omission
- Original signature of one of the submitting Prime(s)

Other: Cover sheets, tabs, letters of intro are not included in 15 pages...but don't go overboard!

Ask questions until 5 business days before submittal due date!!!



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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Biggest Submittal Mistakes/Errors

Not all team members have AE Data Records

Sections 1-5: Information between the sections don't agree

Staff, responsibilities, location and number of offices, Primes,
project info (name, cost and SF)

Section 1: Don't include subconsultants

Section 3: Don't include "x's" anywhere

Section 4:

Don't include scope outside of the definition in the SF
and construction cost

Describe only one building in the SF and construction cost

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Uploading to DFD Website

wisconsin.gov state agencies subject directory

WISBUILD
THE
DSF Information System

Enter Username Here: ae_login

Enter Password:

[Forgot Your Password?](#)

By clicking 'Enter' below and logging in to Wisbuild, you agree to all the terms and conditions as stated in the Wisbuild [User Agreement](#)

Enter

[Frequently Asked Questions](#)

[DSF-NT Login](#)

[DSF News](#)

WISBUILD

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Qualification Submittal

Method: Uploading to DFD Website



WisBuild - Windows Internet Explorer provided by State of Wisconsin

http://wisbuild.doa.state.wi.us/frame_main.asp?mpage=asptoasp&destpage=ae_invite/aeuploadproposal.aspx&inviteid: Live Search

File Edit View Favorites Tools Help

WisBuild

WISBUILD
A/E FUNCTIONS

In Basket
Contacts
A/E Data Record
Change Password
Project Selection
Home
Help
Log Off

AE Invitation Information

Tuesday, October 26, 2010 - Architect

Project No.	10H3A
Agency	UNIVERSITY OF WISCONSIN
Institution	MADISON CAMPUS
Title	Madison, Athletic Performance Center
Description	Construct a new 91,350 ASF/132,460 GSF building to house an athletic performance center and College of Engineering computer equipment. Remodel 43,300 ASF/53,325 GSF of lower level in McClain Center and replace turf and roof. Remodel space in Camp Randall and replace turf and upgrade sound system and scoreboard. Construct site work to include completion of Engineering Drive, a new plaza, and upgrades to Badger Way.
Submittal Deadline	11/9/2010 2:30:00 PM

Your file document must be uploaded prior to the qualification submittal deadline indicated above.

Checking 'Yes' will allow your AE Qualification submittal to be visible to DSF staff, state agency staff, and other staff as identified. Other consultants will not be able to view your qualification submittal. If you have previously uploaded a submittal, it must be deleted in order to choose 'No'.

☐ Yes ☒ No

Format of qualification must be .pdf. Maximum file size is 25 MB. You have the option of deleting and uploading a modified file document at anytime before the submittal deadline. Only one document may be uploaded. You must delete the file before uploading a new file.

Local intranet 100%

start 3 Microsoft Office O... DSF Architect/Engine... WisBuild - A/E Main M... WisBuild - Windows I... Large_for_Print.ppt 12:34 PM

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Method: Uploading to DFD Website

- OFFICIAL submittal is 2 hard copies and 1 electronic (CD/DVD/Flash) submitted to the DFD on time: **Disqualify if NOT!!**
- Update your insurance on or establish an AE Data Record.
- File size limit is 25 MB, required file format is Acrobat (.pdf).
- Only one file may be uploaded, you may upload a revised document prior to the deadline by first deleting the original document using the trash can icon
- Selection Committee and invited guests must sign an Ethical and Confidentiality statement on file with DFD to view qualifications
 - Selection Committee and invited guests may keep the handout material after the interviews



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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Conditions/Stipulations: Screening Form *(see reference section)*

Scoring is relative

- The more submitters, the tighter the scores, the more competition

Objective Information of Prime(s)

- Eligibility Requirements (Section 1: Yes/No)
- Performance Evaluation of Prime(s) (Section 2)
- Geographic proximity (Section 4)
- Status Points: Current DFD projects (Section 6)

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Conditions/Stipulations: Screening Form *(see reference section)*

Subjective Information of Teams (by Selection Committee):

- Team member scores are referenced
- Experience of Prime(s) and team (Section 3)
- Individual members assigned to the project (Section 5)
- Adequacy of staff assigned to the project (Section 5)

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Conditions/Stipulations: Screening Form *(see reference section)*

Scoring Strategies

- Minimize status points
- Maximize performance scores
- Focus on team and experience

Statistics: how do you rate? *(see reference section):*

- Status Points
- Average performance evaluation scores by discipline
by office



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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Conditions/Stipulations:

Typically four firms shortlisted (*in solicitation*)

If you did not meet the qualifications, we will tell you why but you will **not** have a chance to resubmit

Shortlisted firms will be notified via e-mail and advised of the next steps

Submitting firms and results of the shortlisting are posted on the web, about 10 days after due date

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LARGE PROJECT CONSULTANT ORIENTATION

Qualification Submittal

Implementation:

- BE ACCURATE!
- Be factual, clear and consistent
- Do quality check before submitting
- Be prompt
- Establish AE Data Records early
- Discuss scores with team members: primes and subs
- Ask questions prior to the submittal!!!

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Your Goal: To be the top ranked firm of four.

Selection Committee's Priorities:

Who will demonstrate the best response to the project?

- Responding to the interview questions
- Well-thought out issues/concerns, potential solutions
- Who did their homework?

Who will be the best fit for the Agency?

- People skills, involvement of staff
- Sensitivity to the program/description
- Long-term results
- Relevant experience

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Selection Committee's Priorities:

Who will perform the best during the project?

- Level of trust
- Responsiveness to concerns during design and construction
- Working relationship with DFD

How are budget, schedule and construction administration addressed?

How is quality control addressed?

How are people and time managed during the interview?

Who does the talking and who doesn't?

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Selection Committee's Priorities:

Who brings the most to the table?

- Specific ideas and creativity
- Experience/knowledge
- Enthusiasm
- Team chemistry and integration
- What elements separate high from low and highest from rest?
- Level of familiarity with this type of project

Level playing field: Same info/requirements, fair

DO NOT re-justify qualifications

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Your Strategy:

Gather as much info about the project as possible from site visit

Determine what points are important to cover based on your best judgment

Determine how you will address the important parts of the project within the parameters of the interview questions

Be aware of and plan how authority and team integration is portrayed

Identify who will participate in the interview and what topics

- Critical members of team should be there and participate
- Important: team at interview = team on project

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Method:

How you will present your points

Handout, PowerPoint, model, boards, other visuals, demonstrations

No preferred method although...

Handouts are helpful...provide them PRIOR to your presentation

How/if you will rehearse your presentation

How time will be managed

How and by who follow up questions will be handled, including tough questions

Type of presentation is up to team

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Conditions/Stipulations:

Relative to presentations by other firms

Subconsultants on multiple teams?

Fee Rate Sheet submitted in sealed envelope at interview,
only selected firm opened at Fee Meeting, used as
starting point for fee negotiations

Association agreement “in principal” must be presented at
the interview

“Follow the order” for interview questions

Room provided with screen, lighting controls, and
electrical, typically at DOA

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Conditions/Stipulations:

Ties Scores: Team with most #1's, then best performance score
The Selection Committee recommends #1 and #2 firms
based on individual's best judgment, not consensus

The final decision by DOA Secretary

All firms advised of results via phone call with follow up e-mail

Final results posted on the web

Fee Meeting with PM and Lisa Pearson in ~1-2 weeks

Ranking based on what is presented at interviews

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Implementation:

Make your points and cover the material requested in the time allotted, typically 45 minutes (followed by 15 minutes of Q&A)

- For complex projects, know that you will NOT be able to cover every nuance in detail

Be honest, direct and sincere

- Program, budget, schedule, construction administration, QA/QC
- Don't avoid questions or make up answers
- Do ask for clarification, if unsure
- Make eye contact

ACEC

AMERICAN COUNCIL OF ENGINEERING COMPANIES
of Wisconsin



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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Implementation:

Listen carefully and respond to questions

- Clues to what you did or didn't say, or say well
- Clues to what other firms stated
- Another opportunity to drive your points home

How your team manages time, content, concerns and team communication may indicate how the team will perform during the project

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Implementation: Biggest Interview Blunders

Time Management and Question 4

Inadequate budget discussion and analysis

Too little detail, not enough focus on the project

Poor team chemistry, role confusion including Associate firms

Experience not adequately conveyed

Poor presentation skills

Lack of eye contact, hard to hear, unrehearsed, reading from script, handout inconsistent and/or unreadable compared to screen

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LARGE PROJECT CONSULTANT ORIENTATION

Interview: Focus on the Project

Implementation: The Four Aces

- ♠ Address specific project with ideas, show you did your homework, considered User, all topics and disciplines well-addressed, thorough, organized, easy-to-follow
- ♥ Demonstrate strong depth of knowledge, experience by all critical team members
- ♣ Team is well-integrated, cohesive, has synergy, management/control and division of labor clear and consistent incl. association, can engage others
- ♦ What is your secret weapon (or “edge”)?

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LARGE PROJECT CONSULTANT ORIENTATION

LEARN FROM THE EXPERIENCE!

All Prime A/E's can review their team's comments after the interview

- What could be improved, strengths/weaknesses, comfort level
- Typically advise of rank out of four
- Develop long-term strategies (starting slide 67)

Follow up with Selection Committee members, at their convenience

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LARGE PROJECT CONSULTANT ORIENTATION

Conclusion

Two DFD persons with solicitation and contract roles

Lisa Pearson: responsible for contract negotiations

Sharon Blattner Held: responsible for all AE solicitations

DFD continual process improvements

AIA/ACEC/DFD workgroup discussing AE fees

We want your feedback

When in doubt, e-mail-a-question!

Keep posted to the website!

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SUGGESTIONS?

QUESTIONS/ANSWERS?

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LARGE PROJECT CONSULTANT ORIENTATION

Thank you for attending this session!



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LARGE PROJECT CONSULTANT ORIENTATION

EPILOGUE: A FEW WORDS ABOUT FEE PROPOSALS

Greatest lag in process is negotiation ...

Carefully read notification letter and provide everything requested

- Documents are accessible in WisBuild™ under the project number by DFD contact on AE Data Record

Fee proposal and Fee Rate Sheet become part of the contract

All information on all the documents need to be consistent and with the same date

Avoid duplication of information

Reference documents identifying project scope, ID changes

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LARGE PROJECT CONSULTANT ORIENTATION

EPILOGUE: A FEW WORDS ABOUT FEE PROPOSALS

If **pre-design** is required, it will be a separate contract (*See reference section*)

- Show breakdown of tasks including meetings, hours, staff assigned and their hourly rates, deliverables including quantity and format, expenses vs. reimbursables (not the same thing!)

FEE PROPOSAL CHECKLIST and FEE PROPOSAL TEMPLATE (*see small project reference section and DFD website*)

- Reference date of program, changes, schedule
- Additional services included with description vs. not
- Prime and subconsultant information
- Fee Rate Sheet to show site visits and MBE participation
 - Site visits are **BY DISCIPLINE**: can be performed by the same person or same day as project meetings

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LARGE PROJECT CONSULTANT ORIENTATION

EPILOGUE: A FEW WORDS ABOUT FEE PROPOSALS

Final negotiated, signed agreement between Prime and Associate **IS REQUIRED** at time of the final fee proposal

- Jointly and severably liable
- DFD Contract language overrides Agreement
- Who designated to sign contract (DFD prefers one firm)

READ THE CONTRACT SENT AT NOTIFICATION!!

- What is/is not reimbursable is in both contracts
- *Web*: 4147 (**pre-design**), 4519P (all other contracts)

Don't include contractual language (deal breaker!)

Send proposal via e-mail to Lisa Pearson and PM

Contract execution is roughly 22-30 days

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LARGE PROJECT CONSULTANT ORIENTATION

EPILOGUE: A FEW WORDS ABOUT FEE PROPOSALS

Strategies for Expedited Negotiations

Quickest way to get a contract: provide what we ask for the first time!

The more detail, the better...protects everyone

Budget is a very real, limiting factor

There may be no resolution to the negotiations

Work with the Project Manager and/or Lisa Pearson to try to reach agreement

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LARGE PROJECT CONSULTANT ORIENTATION

EPILOGUE: LONG-TERM STRATEGIES

A/E Performance Evaluation

- Performed on most projects over \$185,000
- Effective for 5 years, directly affects future selections with DFD
- Be proactive...find out how you will be evaluated by PM and Field staff
- Primes notified if subs are evaluated
- Use as tool and learn from it
- 30-day challenge period
- *See reference section:*
 - Evaluation criteria
 - Performance standards
 - Averages by discipline



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EPILOGUE: LONG-TERM STRATEGIES

DFD Web: Become familiar with DFD requirements, expectations and procedures

- READ THE CONTRACT TERMS AND CONDITIONS!!
- AE and Consultants Policy and Procedure Manual
- DFD BIM and CAD Standards
- DFD Master Specifications, Design/Energy/Sustainable Guidelines
- Administrative Code 21 (Construction)

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LARGE PROJECT CONSULTANT ORIENTATION

EPILOGUE: LONG-TERM STRATEGIES

Watch for upcoming projects: approved Capital Budget, State Building Commission (SBC)

Establish and maintain a good performance rating

Get to know staff at various facilities

Understand strengths, weakness and where you wish to go and what areas you'd like to pursue

Will the project be a good fit?

Is the investment worth the risk?

- How many tries will you give it?

Prepared for the long haul?

Consider starting with something smaller first?

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LARGE PROJECT CONSULTANT ORIENTATION

EPILOGUE: LONG-TERM STRATEGIES

Familiar with Division of Facilities Development staff
(*see reference section*), contract, design and construction requirements?

Do you have a TEAM with horsepower?

Talk with DFD staff about problems in the past, their expectations

Ask what distinguishes excellent A/E's from good A/E's

Be proactive in addressing concerns, work with the Project Manager





Enjoy the remainder of the Conference!

